

## Flow Process Worksheet Instructions

Process: What process are you documenting? Give your process a name that describes what the process is? (Ex. Baking a Cake)

Summary: This area will be used after the process has been documented in its current state and a proposed process flow has also been documented. This item will be addressed further on in the instructions and completed after you have documented the process..

Person or Material: Indicate if you are tracking the process flow of a person or of material (ex. an application or a person completing an application)

Chart Begins: Indicate where the process begins (with what). This should also be your process input.

Chart Ends: Indicate where the process ends (with what). This should also be your process output.

Charted By: Your individual name or team name

Date: The date the chart was completed

### DETAILS OF:

- Chart the current method of the process first. Do not attempt to analyze or change the process at this point, simply chart the process “as is”.
- Write the process steps down the far left side; put one step per line, use additional sheets if necessary-When looking at a decision point, use one line for “yes” and then, one line for “no”. You will then continue listing the remainder of the process as it would be if you answered “yes” to the decision. Then list the steps in the process as they would be if you answered “no” to the decision. After you have completed the list, you may number the steps. At this point, on your “yes” line, say “continue with step X” and repeat same process on your “no” line.
- After process steps have been documented, go back and shade in the appropriate symbol for each step. A description of each symbol is provided at the end of these instructions.
- Indicate the Distance in Feet Traveled for each process step. Zero may be the appropriate response for some steps in the process.
- Indicate Quantity, if applicable, for each process step—generally used if you have to repeat an operation over and over until a certain amount is achieved before you can move onto the next step (batch processing)
- Indicate the Amount of Time it takes for each process step
- Now, draw a line connecting the shaded in symbols

- Complete the analysis section of the sheet by answering the questions, what, where, when, who and how-you do not necessarily have to include any information in this area, just ask and think about the questions.
- Go back to the Summary section on the sheet and indicate the number of times each process symbol occurred and the total amount of time for each process symbol.
- Complete the Analysis for Change by examining each step to determine if it can be eliminated, combined with another step, moved in the sequence, place or person can change or improved.
- After Analysis has been done, complete an Improved Flow Process Worksheet based on the changes from your analysis using the same steps as you used to chart the “Current” Process.
- After the Improved Flow Process Worksheet has been completed, complete the area under the Summary for the improved flow
- Calculate the difference from the present flow and proposed flow under the Summary section of the sheet.

Continue this process until you have reached the best possible improved flow. The most desirous flow would consist of mainly *Operations*. You want your line connecting the symbols to be as far to the left as possible with as few spikes to the other symbols as possible.



Operation: a main step, where the part, material, or product is usually changed



Transport: the movement of workers, materials, or equipment



Inspection/Decision: Indicates a check for quality or a determination is made



Delays: Indicates a delay in the process, or an object laid aside until required



Storage: Controlled storage in which material is received into or taken from or an item is retained for reference purposes